

SELECTED RESERVE INCENTIVE PROGRAM - EDUCATIONAL ASSISTANCE ADDENDUM

For use of this form, see AR 135-7; the proponent agency is DCSPER

ARNG: ADDENDUM TO DD FORM 4 SERIES (ENLISTMENT REENLISTMENT DOCUMENT- ARMED FORCES OF THE UNITED STATES)

USAR: ADDENDUM TO DA FORM 3540 SERIES CERTIFICATE AND ACKNOWLEDGEMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS (ENLISTING, REENLISTING OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE US ARMY RESERVE)

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Title 10 USC Section 270, 10 USC 511, 10 USC 673a and Executive Order 9397, 22 November 1943.

PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under the SRIP and to insure that your agreement to these conditions is a matter of record.

ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the SRIP; occasionally as a basis for suspension, termination, and recoupment if requirements are not met.

DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided you will not be eligible for the SRIP.

I. APPLICABILITY

This addendum will be completed by all persons enlisting into ARNG or USAR units for entitlement under the Selected Reserve Incentive Program.

II. INSTRUCTIONS

The service representative is responsible for reading and explaining the SRIP requirements outlined in this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each copy of the DD Form 4 series for ARNG personnel, or the DA Form 3540 for USAR personnel.

III. ACKNOWLEDGEMENT

In connection with my enlistment in the Army National Guard US Army Reserve under the Selected Reserve Incentive Program, I hereby acknowledge I meet the following eligibility criteria:

1. I have never previously served on 1 or more days of active duty or active duty for training.
2. I am a secondary school graduate, OR I am currently attending a secondary school and expect to graduate before I enter the second phase of initial active duty for training under the split-training option.
3. I have attained an AFQT score of 31 or more, or if I am attending a secondary school, I am in Mental Category I, II, or IIIA.
4. I am not enlisting in the ARNG/USAR to fill a permanent civilian position where membership in the Selected Reserve is a condition of employment (temporary civilian assignment is excluded).
5. I am not enlisting for voluntary assignment to full-time active duty or active duty for training exceeding 90 days in support of the Reserve program.
6. I am enlisting in the ARNG/USAR with concurrent assignment to a unit of the Selected Reserve and incentive entitlement is based on:
(Enter the appropriate below)
 - a. My enlistment for a unit which has been approved for incentive entitlement (BONUS UNIT):

Enter Complete Unit Identification and UIC

- b. My enlistment for a military occupational specialty (MOS) which has been approved for incentive entitlement (BONUS SKILL):

Enter MOS

IV. OBLIGATION



(Applicant must initial this block) I am enlisting for eight (8) years (8x0, 6x2) in the ARNG/USAR and I agree to serve my initial six (6) years in a bonus unit, or in a bonus skill, unless excused for the convenience of the Government, to include normal career progression. I must serve satisfactorily, as prescribed by ARNG or USAR regulations, unless excuse for the convenience of the Government.

V. ENTITLEMENT

 (Initial) I am selecting the EDUCATIONAL ASSISTANCE as my enlistment incentive option:

1. This will provide up to 100% of my educational expenses, incurred since enlistment, including tuition, fees, books, laboratory fees, and shop fees for consumable material used as a part of classroom or shop instruction, until I complete a course of study pursued at a nationally accredited institution, or until my entitlement terminates. Educational expenses do not include room and board which are not authorized for incentive payments.
2. The amount of EDUCATIONAL ASSISTANCE will not exceed one thousand dollars (\$1000) in any twelve (12) month period commencing from the date of my enlistment, nor will it exceed a total of four thousand dollars (\$4000) over the first six (6) years of the enlistment term.
3. All incentive payments are subject to Federal and State income tax withholdings.
4. I understand I must initiate a request for EDUCATIONAL ASSISTANCE payments and I am eligible to receive reimbursement for qualifying educational expenses incurred only after my date of enlistment. Forms and instructions for my request can be obtained from my unit commander. Receipts will be required to support my request for reimbursement. I understand I cannot receive any payments until I have received my secondary school diploma, completed initial active duty for training, and have been qualified in my MOS.

VI. SUSPENSION

I understand that under certain conditions I can be suspended on a one time basis for a specified period from the incentive program, rather than being terminated. Suspensions are limited to the following conditions:

1. Temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Inactive National Guard or Individual Ready Reserve for personal reasons for up to 1 year. Reinstatement to partial or full resumption of incentive eligibility, when authorized, requires extending my term of service equal to the period I was in a nonavailable status and reestablishing my basic incentive eligibility.
2. Entry into a weight control program.
3. Becoming non-MOS qualified without violating my obligation.
4. Participation in any DOD approved program which will provide for suspension from incentive eligibility.

VII. TERMINATION

My entitlement to EDUCATIONAL ASSISTANCE is terminated should any of the conditions listed below occur before the fulfillment of my enlistment agreement and obligation. However, if, on termination of EDUCATIONAL ASSISTANCE, I continue to meet the eligibility criteria established for the cash ENLISTMENT BONUS and the total amount of EDUCATIONAL ASSISTANCE benefits received by me is less than the total authorized under the cash ENLISTMENT BONUS, I may be eligible for conversion to the cash ENLISTMENT BONUS instead. On conversion, any subsequent payment amounts will be based on the difference between the total EDUCATIONAL ASSISTANCE received and that amount authorized under the cash ENLISTMENT BONUS. Payments will not exceed the normal ENLISTMENT BONUS payment schedule.

1. Unsatisfactory participation per AR 135-91.
2. Moves to a non-bonus MOS, except for normal career progression or at the express direction of the ARNG/USAR.
3. Voluntary transfer to a non-bonus unit.
4. Separation from the Selected Reserve as an enlisted person for any reason, EXCEPT separation for:
 - a. A period of nonavailability authorized a suspension;
 - b. Acceptance of an immediate appointment as an officer in the Ready Reserve.
5. Acceptance of a permanent civilian position where membership in the Reserve is a condition of employment (persons on temporary civilian assignment are excluded).
6. Participation in the Reserve Officer Training Corps/Simultaneous Membership Program (ROTC/SMP) on enrollment in the ROTC advanced course, or assignment to Control Group (ROTC).
7. Failure to extend the term of service for an authorized period of nonavailability.
8. Nonavailability in excess of the maximum period authorized for suspension.
9. Cease to attend an accredited educational institution.
10. Completion of a course of study leading to the award of a baccalaureate degree or an equivalent non-degree program of study.

VIII. RECOUPMENT

If my entitlement to EDUCATIONAL ASSISTANCE is terminated for a reason listed in paragraphs 1 through 4 of Section VII above, I may be subject to recoupment action. The recoupment amount will be a portion (not to exceed 100%) of the amount of all taxable EDUCATIONAL ASSISTANCE I have received to date and will be calculated as follows:

1. The number of months of obligated service remaining during the term of enlistment is divided by 72 months (the total number of months of obligated service of the enlistment term).
2. The result of the above will be multiplied by the total amount of taxable assistance provided me to date.
3. Any refund made by me will not affect my period of obligation to serve in the ARNG or USAR.

IX. STATEMENT OF UNDERSTANDING

I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my enlistment for an incentive. Any other promise, representation, or commitments, made to me in connection with my enlistment for an incentive have been entered below in my own handwriting, or they are hereby waived. *(If none, indicate by writing the word "NONE" below.)*

(Date Signed)

(Applicant's Signature)

(SSN)

(Typed or Printed Name and Rank)

X. CERTIFICATE BY SERVICE REPRESENTATIVE

I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. No other promises were made to the applicant as a condition of entitlement to the Selected Reserve Incentive Program. I have provided the applicant with a copy of this form.

(Date Signed)

(Signature of Service Representative)

(Title)

(Typed or Printed Name and Rank)